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# Foodservice Single-Use Products: Europe

June 2020



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# Table of Contents

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<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>4</b>
Historical Trends	4
Key Economic Indicators	6
Near-Term Impact of COVID-19	7
Sustainability Issues	8
Regulatory Factors	9
Europe Regional Outlook	11
<b>3. Segmentation &amp; Forecasts</b>	<b>13</b>
Types	13
Serviceware	14
Packaging	15
Other Types	15
Markets	17
Quick-Service & Fast Casual Restaurants	19
Full-Service Restaurants	20
Other Eating & Drinking Places	20
Other Foodservice Establishments	21
<b>4. Industry Structure</b>	<b>23</b>
Industry Characteristics	23
Market Leaders	24
Essity	25
Huhtamaki	25
Reynolds Group	25
<b>5. About This Report</b>	<b>27</b>
Scope	27
Sources	28
Industry Codes	29
Freedonia Methodology	29
Resources	31

# List of Tables & Figures

---

Figure 1   Europe: Key Trends in the Foodservice Single-Use Product Market, 2019 – 2024	3
Figure 2   Europe: Foodservice Single-Use Product Demand Trends, 2009 – 2019	5
Table 1   Europe: Key Indicators for Foodservice Single-Use Product Demand, 2009 – 2024 (2018US\$ bil)	6
Figure 3   Europe: Foodservice Single-Use Product Demand by Country, 2019 (%)	11
Figure 4   Europe: Foodservice Single-Use Product Demand by Type, 2009 – 2024 (US\$ bil)	13
Table 2   Europe: Foodservice Single-Use Product Demand by Type, 2009 – 2024 (US\$ mil)	13
Figure 5   Europe: Foodservice Single-Use Product Demand by Type, 2009 – 2024 (%)	16
Figure 6   Europe: Foodservice Single-Use Product Demand by Market, 2009 – 2024 (US\$ bil)	17
Table 3   Europe: Foodservice Single-Use Product Demand by Market, 2009 – 2024 (US\$ mil)	17
Figure 7   Europe: Foodservice Single-Use Product Demand by Market, 2009 – 2024 (%)	22
Table 4   Europe: Selected Suppliers to the Foodservice Single-Use Product Market	24
Table 5   Countries in Western Europe	28
Table 6   Countries in Eastern Europe	28
Table 7   HS Codes Related to Foodservice Single-Use Products	29
Table 8   NACE Codes Related to Foodservice Single-Use Products	29

# About This Report

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## Scope

This report forecasts to 2024 foodservice single-use product demand in nominal US dollars at the manufacturer level in Europe. Total demand is segmented by type in terms of:

- serviceware
- packaging
- other types such as moist towelettes, napkins, and table covers

Total demand is also segmented by market as follows:

- quick-service and fast casual restaurants
- full-service restaurants
- other eating and drinking places such as bakeries, bars/pubs, and coffee shops
- other foodservice establishments such as institutions, retail settings, and lodging and hospitality establishments

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; the various segments are reported at five-year intervals for 2009, 2014, and 2019.

This report examines the market for foodservice single-use (disposable) products. For the purposes of this report, “single-use” products refers to items used in the service of food and beverages that are intended to be disposed of after use. “Single-use” and “disposable” are used interchangeably throughout this report. Items with increased durability that allow multiple uses for various applications, such as plastic takeout containers, are included. Disposable items used for the preparation of food or beverages that do not reach the end user are excluded.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate at that prevailing in 2019.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

## About This Report

**Table 5 | Countries in Western Europe**

Andorra	Gibraltar	Jersey	Saint Pierre and Miquelon
Austria	Greece	Liechtenstein	San Marino
Belgium	Greenland	Luxembourg	Spain*
Channel Islands	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands*	United Kingdom*
France*	Isle of Man	Norway	Vatican City
Germany*	Italy*	Portugal	

\*Major foodservice single-use product markets

Source: The Freedonia Group

**Table 6 | Countries in Eastern Europe**

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland	

\*Major foodservice single-use product market

Source: The Freedonia Group

## Sources

*Foodservice Single-Use Products: Europe* (FE30029) is based on *Global Foodservice Single-Use Products*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

## About This Report

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 7 | HS Codes Related to Foodservice Single-Use Products**

HS Code	Definition
3923.50	Stoppers, lids, caps, and other closures
3924	Tableware, kitchenware, other household articles and hygienic or toilet articles, of plastics
4819.10.20	Cartons, boxes and cases, of corrugated paper or paperboard: Sanitary food and beverage containers
4819.20.20	Folding cartons, boxes and cases of non-corrugated paper or paperboard: Sanitary food and beverage containers
4819.50.20	Other packaging containers: Sanitary food and beverage containers
9902.11.93	Plastic lids certified by the importer for use on food storage containers
9902.11.97	Disposable cutlery of plastics, containing by weight over 96% of polypropylene

Source: United Nations Statistics Division

**Table 8 | NACE Codes Related to Foodservice Single-Use Products**

NACE Code	Definition
17.21	Manufacture of corrugated paper and paperboard and of containers of paper and paperboard
17.22	Manufacture of household and sanitary goods and of toilet requisites
22.22	Manufacture of plastic packing goods
22.29	Manufacture of other plastic products
25.71	Manufacture of cutlery
25.92	Manufacture of light metal packaging

Source: European Commission

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both

## About This Report

top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Global Foodservice Single-Use Products*

### Freedonia Industry Studies

*Cannabis Packaging Opportunities*

*Converted Flexible Packaging*

*Corrugated & Paperboard Boxes*

*Food & Beverage Packaging Innovation*

*Foodservice Single-Use Products*

*Global Corrugated Boxes*

*Global Cups & Lids*

*Global Disposable Masks & Respirators: COVID-19 Impact Analysis*

*Global Disposable Medical Gloves: COVID-19 Impact Analysis*

*Global Foodservice*

*Global Single-Use Plastic Packaging Regulations*

*Meat, Poultry, & Seafood Packaging*

*Molded Pulp Packaging*

*Retail Bags*

*Stretch & Shrink Film*

*Wipes*

### Freedonia Focus Reports

*Beverages: United States*

*Corrugated Boxes: Europe*

*COVID-19 Market Impact Analysis*

*Fast Food: United States*

*Food Processing Machinery: Europe*

*Global Demographics*

*Global Food E-Commerce*

*Plastic Foams: United States*

*Polystyrene: United States*

*Restaurants & Foodservice: United States*

*Soft Drinks: United States*

*Tableware & Kitchenware: United States*

*Thermoplastic Resins: United States*

### Freedonia Custom Research



### Packaged Facts

*Meal Kits: Trends and Opportunities in the U.S.*

*Online Grocery Shopping in the U.S.*

*U.S. Beverage Market Outlook 2020: Grocery Shopping & Personal Consumption in the Coronavirus Era*

*U.S. Food Market Outlook 2020: Home Cooking, Grocery Shopping, & Food Trends in the Age of Coronavirus*

### Trade Publications

*Chain Store Age*

*Convenience Store News*

*Fast Casual*

*Foodservice Equipment & Supplies*

*Flexible Packaging*

*FoodService Director*

*Nation's Restaurant News*

*Packaging World*

*Perishable News*

*Plastics News*

*PlasticsToday*

*Restaurant Hospitality*

*Retail Leader*

*Tissue World*

### Agencies & Associations

European Commission

European Environment Agency

European Organization for Packaging and the Environment

Eurostat

Flexible Packaging Europe

FoodServiceEurope

Foodservice Packaging Institute

International Foodservice Distributors Association

International Monetary Fund

National Restaurant Association

Organisation for Economic Co-operation and Development

United Kingdom Environment Agency

World Bank